1 Estate of Patricia A. Chaney

Case No. 04CEPR01052

Attorney: Steven F. Salazar (for Administrator Martin Wade Chaney) Attorney: Mark S. Poochigian (for Administrator Rhonda A. Malewski)

Probate Status Hearing RE: Filing of the Inventory and Appraisal and Proof of

Property Listing.

ANN CHANEY MALEWSKI were appointed co-administrators with full IAEA authority and without bond on 10/12/2004. Cont. from Aff. Sub. Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff. Mail Aff. Pub. Sp. Nic. Pers. Serv. Conf. Screen Conf. Screen Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation AMN CHANEY MALEWSKI were appointed co-administrators with full IAEA authority and without bond on 10/12/2004. Minute order dated 7/23/15 states the Court will allow Mr. Poochigian to submit a copy of the filed inventory and appraisal with an original signature of his client. Counsel reports that the property is not yet listed, but they anticipate getting it listed in a week or two. The Court wants paper proof of the listing filed. The Co-Administrators are ordered to be personally present in court or appear via Court Call if the required documents are not filed at least two court days prior, then no appearance is necessary on 8/13/15. Noted paper proof of property listing are filed at least two court days prior, then no appearance is necessary on 8/13/15. Noted paper proof of property listing or current written status report. Note personally present in court or appear via Court Call if the required documents are not filed at least two court days prior, then no appearance is necessary on 8/13/15. Noted paper proof of property listing or current written status report. Reviewed by: KT Reviewed on: 8/7/15 Updates: Recommendation:	DOD: 2/6/2004	MARTIN WAYDE CHANEY and RHONDA	NEEDS/PROBLEMS/COMMENTS:
Aff. Sub. Wit. Letters issued on 10/12/2004. Letters issued on 10/12/2004. Letters issued on 10/12/2004. Inventory and appraisal was due March PTC			
Cont. from		· ·	
Cont. from		•	
Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Duties/Supp Objections Video Receipt CI Report 97202 Order Aff. Posting Status Rpt UCCJEA Citation Aff. Posting Status Rpt UCCJEA Citation Aff. Posting CI Report Status Rpt UCCJEA Citation Aff. Posting Citation Aff. Posting Citation Letters issued on 10/12/2004. Inventory and appraisal was due March 2005. Inventory and appraisal was due March 2005. Signature of his client. Counsel reports that the property is not yet listed, but they anticipate getting it listed in a week or two. The Court wants paper proof of the listing filed. The Co-Administrators are ordered to be personally present in court or appear via Court Call if the required documents are not filed. If both the inventory and appraisal and the proof of property listing are filed at least two court days prior, then no appearance is necessary on 8/13/15. Need paper proof of property listing or current written status report. Reviewed by: KT Reviewed on: 8/7/15 Updates: Recommendation:	Cont. from	= 10/12/2004.	
Inventory Inve	Aff.Sub.Wit.	Letters issued on 10/12/2004.	
PTC Not.Cred. Notice of Hrg Aff.Nail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation Citation Citation Citation Cond. Status Rpt UCCJEA Citation Cond. Status Rpt Reviewed On: 8/7/15 UCCJEA Citation Cond. Status Rpt Cond. Status Rpt Reviewed On: 8/7/15 Updates: Recommendation: Cond. Status Rpt Cond. Status Rpt Reviewed On: 8/7/15 Updates: Recommendation:	Verified]	
Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation First account or petition for final distribution was due October 2005. The Co-Administrators are ordered to be personally present in court or appear via Court Call if the required documents are not filed. If both the inventory and appraisal and the proof of property listing are filed at least two court days prior, then no appearance is necessary on 8/13/15. Notice of Hrg Aff.Pub. U.S. Bank - \$1,778.52. Inventory and Appraisal filed on 1/20/15 showing an estate valued at \$423,000.00. (signed only by Co-Administrator Martin Wade Chaney) - Copy of Inventory with the signature of Co-Administrator Rhonda Malewski was filed on 7/31/15. Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation First account or petition for final distribution was due October 2005. The Co-Administrators are ordered to be personally present in court or appear via Court Call if the required documents are not filed. If both the inventory and appraisal and the proof of property listing are filed at least two court days prior, then no appearance is necessary on 8/13/15. Need paper proof of property listing or current written status report. Reviewed by: KT Reviewed on: 8/7/15 Updates: Recommendation:	Inventory	1 ' ' '	
Notice of Hrg	PTC	2003.	
Hrg	Not.Cred.	First account or petition for final	
Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt U.C. Bank - \$1,778.52. Creditor's Claims filed: U.S. Bank - \$1,778.52. Inventory and Appraisal filed on 1/20/15 showing an estate valued at \$423,000.00. (signed only by Co-Administrator Martin Wade Chaney) - Copy of Inventory with the signature of Co-Administrator Rhonda Malewski was filed on 7/31/15. Reviewed by: KT Reviewed on: 8/7/15 Updates: Recommendation:		distribution was due October 2005.	
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Inventory and Appraisal filed on 1/20/15 showing an estate valued at \$423,000.00. (signed only by Co-Administrator Martin Wade Chaney) – Copy of Inventory with the signature of Co-Administrator Rhonda Malewski was filed on 7/31/15. Video Receipt		U.S. Bank - \$1,//8.52.	, , ,
Pers.Serv. showing an estate valued at \$423,000.00. (signed only by Co-Administrator Martin Wade Chaney) - Copy of Inventory with the signature of Co-Administrator Rhonda Malewski was filed on 7/31/15. Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Citation Showing an estate valued at \$423,000.00. (signed only by Co-Administrator Martin Wade Chaney) - Copy of Inventory with the signature of Co-Administrator Rhonda Malewski was filed on 7/31/15. 1. Need paper proof of property listing or current written status report. Reviewed by: KT Reviewed by: KT Reviewed on: 8/7/15 Updates: Recommendation:		Inventory and Appraisal filed on 1/20/15	
Screen	Pers.Serv.	, , ,	
Letters			
Duties/Supp Co-Administrator Rhonda Malewski was filed on 7/31/15.		-	
Objections Filed on 7/31/15. report. Video Receipt			
Video Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Uiccjea Citation Video Receipt Reviewed by: KT Reviewed on: 8/7/15 Updates: Recommendation:			
Receipt CI Report 9202 Order Aff. Posting Status Rpt UCCJEA UCCJEA Citation Reviewed by: KT Reviewed on: 8/7/15 Updates: Recommendation:	Objections	illed 0117/31/13.	τεροπ.
CI Report 9202 Order Aff. Posting Status Rpt UCCJEA Uiccitation Reviewed by: KT Reviewed on: 8/7/15 Updates: Recommendation:			
9202 Order Reviewed by: KT Reviewed on: 8/7/15 UCCJEA Updates: Recommendation:			
Order Aff. Posting Status Rpt UCCJEA Citation Reviewed by: KT Reviewed on: 8/7/15 Updates: Recommendation:			
Aff. Posting Status Rpt UCCJEA Citation Reviewed by: KT Reviewed on: 8/7/15 Updates: Recommendation:	9202	_	
Status Rpt UCCJEA Uitation Reviewed on: 8/7/15 Updates: Recommendation:	 	_	
UCCJEA Updates: Citation Recommendation:		_	
Citation Recommendation:			· ·
			•
FTB Notice File 1 – Chaney	FTB Notice		File 1 – Chaney

Attorney

Ruby Taylor (Det Succ)

Horton, Lisa (for Debra Emery and Regina Wadford – Petitioners)

2nd Amended Petition to Determine Succession to Real Property

DO	D: 06/23/09		DEBRA M. EMERY and REGINA	NEEDS/PROBLEMS/COMMENTS:
			WADFORD, daughters, are	
\parallel			Petitioners.	
\parallel			1 0 111013.	
Co	nt. from		40 days since DOD	
	Aff.Sub.Wit.			
✓	Verified		No other proceedings	
√	Inventory		I & A - \$75,000.00	
	PTC		I & A - \$75,000.00	
	Not.Cred.		Will dated 08/19/97	
✓	Notice of			
	Hrg		Petitioners request Court	
\checkmark	Aff.Mail	w/	determination that decedent's	
	Aff.Pub.		100% interest in real property	
	Sp.Ntc.		located at 955 N. Hughes Ave.,	
	Pers.Serv.		Fresno pass to them pursuant to	
	Conf.		decedent's will.	
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 08/07/15
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 2 – Taylor

Case No. 10CEPR00897

3 Margaret Archuleta (CONS/PE) Case Attorney: Dean Hiyama (for Petitioner/Conservator Antoinette Hernandez)

Petition for Termination of Conservatorship

DO	D: 9/20/14		ANTOINETTE HERNANDEZ,	NEEDS/PROBLEMS/COMMENTS:
	D. 7/20/14		daughter/Conservator, is petitioner.	INCLUSATION CONTINUENTS.
-			adogrilor, consolvator, is politioner.	
			Petitioner states the conservatorship of	
			the person and estate is no longer	
Со	nt. from		necessary because the conservatee	
	Aff.Sub.Wit.		died.	
1	Verified			
	Inventory		On 6/19/14 the court entered an order waiving all future accountings in this	
	PTC		matter.	
	Not.Cred.			
1	Notice of		Wherefore, Petitioner requests that the	
	Hrg		conservatorship of the person and estate of Margaret Archuleta be	
✓	Aff.Mail	W/	terminated without the requirement of	
	Aff.Pub.		an accounting.	
	Sp.Ntc.			
	Pers.Serv.			
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 8/7/15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 3 – Archuleta

Daniel Antonio Rowe (CONS/P) Case no. 11CEPR00883

Petitioner/Conservator: Juanita Maria (Vargas) Rodriguez (pro per)

Petition to Fix Residence Outside the State of California

	Petition to Fix Residence Outside the State of California				
			JUANITA MARIA (VARGAS)	NEEDS/PROBLEMS/COMMENTS:	
			RODRIGUEZ, Conservator, is		
			petitioner.	Continued from 7/16/15. Minute	
			·	order states the matter is continued	
	nt. from 07161	5		for service of, or consent from, Mr.	
	Aff.Sub.Wit.	-	JUANITA MARIA (VARGAS)	Rowe. Ms. Rodriguez represents to	
-			RODRIGUEZ, mother, was	the court that Mr. Rowe is non-verbal and is unable to write his name. The	
✓	Verified		appointed conservator on 11/9/11.	Court will allow an "x" for Mr. Rowe's	
	Inventory			signature as long as witnessed and	
	PTC		Petitioner request permission to fix	includes a statement as to what	
	Not.Cred.		the residence of the conservatee	occurred. As of 8/6/15 the following	
	Notice of		outside the state of California to	issue remains:	
🗸	Hrg		Everett, Washington.		
1	Aff.Mail	W/	Petitioner states she has retired	Need proof of service of the	
		'''	from her current position with the	Notice of Hearing on	
	Aff.Pub.		County of Fresno and relocated	Conservatee Daniel Antonio	
	Sp.Ntc.		with her minor children and the	Rowe.	
	Pers.Serv.		Conservatee to Everett		
	Conf.		Washington on 6/11/15 in order to		
	Screen		live with her fiancé.	Note: If the petition is granted, status	
	Letters			hearings will be set as follows:	
	Duties/Supp		Petition states the duration of the	• Wednesday, January 20, 2016 at	
	Objections		out-of-state move is expected to	9:00 a.m. in Department 303, for	
	Video		be more than four months and a	proof of establishment of	
	Receipt		conservatorship will be	conservatorship in Washington	
	CI Report		commenced in the place of the new residence.	and termination of	
	9202		new residence.	conservatorship in California.	
1	Order			Pursuant to Local Rule 7.5 if the	
*	0.40.			required documents are filed 10	
				days prior the date set the status	
				hearing will come off calendar and	
				no appearance will be required.	
	Aff. Posting			Reviewed by: KT	
	Status Rpt			Reviewed on: 8/7/15	
	UCCJEA			Updates:	
	Citation			Recommendation:	
	FTB Notice			File 4 - Rowe	

4

Attorney

Rindlisbacher, Curtis D. (for Barbara Brady – Executor – Petitioner)

Final Report of Executor, Petition for Its Settlement, Allowance of Compensation to Executor and Attorneys for Ordinary Services and for Allowance of Compensation to Executor and Attorneys for Extraordinary Services and Reimbursement of Expenses and for

Final Distribution of Insolvent Estate

DO	D: 11/18/12	BARBARA BRADY, Executor with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
		Account period: 11/18/12-6/25/15 Accounting: \$234,153.69 Beginning POH: \$220,931.36	SEE ADDITIONAL PAGES
	Aff.Sub.Wit.	Ending POH: \$ 31,968.04 (cash)	
~	Verified	Executor (Statutory): \$7,617.40	
*	Inventory	(see NEEDS/PROBLEMS/COMMENTS)	
~	PTC	Petitioner requests to distribute two tangible personal	
~	Not.Cred.	property items valued at approx. \$70.01 on ebay and	
~	Notice of	reduce her statutory compensation by that amount for	
~	Hrg	a total of \$7,547.39.	
Ě	Aff.Mail	Executor (Extraordinary): \$7,178.87 (for 298.80 hours @	
	Aff.Pub.	\$20/hr plus \$601.94 in travel expenses including hotels,	
	Sp.Ntc.	postage, fax, meals, and \$600.93 in mileage @	
	Pers.Serv.	\$.565/mile, for services detailed on Exhibits D and E.	
	Conf. Screen	Allows 21 (Charlestons): C7 / 17 40	
~	Letters	Attorney (Statutory): \$7,617.40 (see NEEDS/PROBLEMS/COMMENTS)	
Ě		[366 NELD3/1 KOBELINIS/CONINIENTS)	
	Duties/Supp	Attorney (Extraordinary): \$6,731.00	
	Objections Video	(for 147.1 attorney hours @ \$310/hr plus 24.40 paralegal	
	Video Receipt	hours @ \$100/hr, for services including the sale of the	
	CI Report	real property, marshaling various assets from the State	
~	9202	of California Unclaimed Property, etc. See Exhibit F for details.)	
~	Order		
	Aff. Posting	Costs: \$422.96 (filing)	Reviewed by: skc
	Status Rpt		Reviewed on:
	in the second se	Petitioner states the property on hand includes an	8/11/15
	UCCJEA	additional amount from the sale of the estate real	Updates:
	Citation	 property being held by the New Haven Homeowners Association's attorney Steeven Hrdlicka in the amount 	Recommendation:
>	FTB Notice	of \$1,479.89, which is to be released to the estate if needed to pay creditors. Petitioner hereby requests the Court order the release of these funds to the estate.	File 5 – Phillips
		SEE ADDITIONAL PAGES	

Page 2

Petitioner states \$30,173.85 in creditor's claims was allowed. See petition for details.

The amount remaining to pay claims after payment of the administrative expenses as set forth above is \$2,470.42. Claims should be paid proportionally as follows:

Expenses of last illness per §11420(a)(4):

- DHS \$2,099.05
- Oxygen Qualifying Services \$5.64
- St. Agnes Medical Center \$350.79
- North Fresno Emergency Physicians \$14.94

General Debts per §11420(a)(7): After paying expenses of last illness, there is no remaining cash to the various claims filed by Fresno Credit Bureau.

Petitioner prays for an order that:

- 1. Administration be brought to a close;
- 2. All acts and proceedings of Executor be confirmed and approved;
- 3. Steven Hrdlicka, attorney for New Haven Homeowners Association, is ordered to pay the sum of \$1,479.89 from his trust account to the Estate of Lynda Phillips;
- 4. Petitioner be authorized and directed to pay the expenses and debts as set forth above; and
- 5. Distribution of the estate in Petitioner's hands and any other property not now known or discovered to the persons entitled to it.

NEEDS/PROBLEMS/COMMENTS:

I&A Partial No. 2 filed 5/23/13 includes shares of Rockwell Collins, Inc., stock valued at \$19,126.58
(Principal) and with dividends of \$105.46. Petitioner states she was contacted by Wells Fargo
Shareholder Services and informed that the stock was sold and distributed to the estate in error; that
it actually belonged to another Lynda Phillips in Fresno. After independent investigation, Petitioner
returned \$22,240.39 to Wells Fargo Shareholder Services.

However, no Corrected I&A was filed, and it appears this amount is still being used to calculate statutory compensation. It does not appear as a loss either. Instead, Petitioner appears to be using the inventory value of the asset \$19,232.04 plus the difference of \$3,008.35 as a *gain* for calculation of statutory compensation.

If this stock was not actually an asset of the estate, either a corrected I&A should be filed, or the return of this asset should be included as a loss, and recalculation of compensation is necessary.

2. The Court may require clarification regarding the benefit to the estate for the hours spent and extraordinary compensation requested by Executor and Attorney in connection with the sale of personal property.

6 Everlener Raymond (Det Succ) Case No. 12CEPR01120

Attorney: Randolf Krbechek (for Petitioners)

Status Hearing re: Failure to Flle Documents Required by Minute Order Dated 4/8/15 so that the Order Can be Signed.

DOD: 7/26/2000		MARY MCGEE, RITA JONES, EARL	NEEDS/PROBLEMS/COMMENTS:
		LOCKHART, JR., EVERLENER SMITH,	
		JACKIE LOCKHART, ARTHUR LOCKHART,	OFF CALENDAR. Order signed
		DAVID LOCKHART, RICKY LOCKHART,	8/7/15.
Со	ont. from 072215	JAMES LOCKHART, grandchildren, petitioned the court to determine	
	Aff.Sub.Wit.	succession to real property.	
	Verified		Minute order from 7/22/15 states Mr.
	Inventory	One of the heirs of the decedent, Opal	Krbechek represents to the Court that
	PTC	White, died after the decedent. A Special Administrator is needed in order	all of the necessary documents have
	Not.Cred.	to sign this petition on her behalf.	been submitted to the Clerk's Office. He also states that the Special
	Notice of		Administration petition was intended
	Hrg	Minute Order dated 4/8/15 states the	to be an ex parte request. The Court
	Aff.Mail	Court finds this matter approved upon	will review the matter and approve if
	Aff.Pub.	the filing of an Ex Parte Petition for	able. Please see related case on
	Sp.Ntc.	Special Administration for the sole purpose of signing this petition.	page 17 Special Administration for
	Pers.Serv.		beneficiary, Opal White.
	Conf.	A Special Administration Petition was	
	Screen	filed for Opal White and is set for	
	Letters	hearing on 8/13/15.	
	Duties/Supp	Status Panart of Pandolf Krhoobak filed	
	Objections	Status Report of Randolf Krbechek filed on 7/2/15 states he mailed the required	
	Video	documents to the court on 6/12/15. For	
	Receipt	some unknown reason the documents	
	CI Report	were returned to his office by the post	
	9202	office. Mr. Krbechek states the	
	Order	documents were filed with this status	
	Aff. Posting	report. Mr. Krbechek states the	Reviewed by: KT
	Status Rpt	petitioners have complied with the minute order and therefore it is	Reviewed on: 8/7/15
	UCCJEA	requested that the court cancel this	Updates:
	Citation	status hearing.	Recommendation:
	FTB Notice		File 6 – Raymond

7 Margaret Thomas (CONS/PE)

Case No. 13CEPR00093

Attorney

Rube, Melvin K. (for Joyce V. Davis – Conservator – Petitioner)

Third Amended First Report and Account of Conservator and Petition for: 1) Its Settlement; 2) Attorney Compensation; 3) Leave to Resign as Conservator of the Estate;

and for 4) Appointment of Successor Conservator of the Estate

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:
		oco pomien ioi dei diioi	
-			Note: This account covers
			through 3/31/14. If granted,
	A# CI- WH		the Court will set a status
<u> </u>	Aff.Sub.Wit.		hearing for the filing of Conservator Joyce V. Davis'
<u> </u>	Verified		Final Account Current as
	Inventory		follows:
	PTC		
	Not.Cred.		• Thursday, October 15, 2015
~	Notice of		for filing of Conservator's
	Hrg		Final Account
~	Aff.Mail w		
	Aff.Pub.		If filed prior to the above
	Sp.Ntc.		status date per Local Rule 7.5, the status hearing will come
	Pers.Serv.		off calendar.
	Conf.		on outsiden.
	Screen		Note: Once the final account
~	Letters 3/22/13		has been settled, appropriate
	Duties/Supp		bond can be determined for
	Objections		Successor Conservator Bruce
	Video		Bickel.
	Receipt		
~	CI Report		
~	2620(c) X		
~	Order		
	Aff. Posting		Reviewed by: skc
	Status Rpt		Reviewed on: 8/11/15
	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 7 – Thomas
	•		

Case No. 13CEPR00940

Attorney Nunez, Henry D. (for Co-Executors)

Probate Status Hearing Re: Filing of First Account and Petition for Final Distribution

DO	D: 9/28/11	ESTELLA GARZA GARZA, RAQUEL GARZA NANEZ, and	NEEDS/PROBLEMS/
		ROJELIA GARZA GONZALEZ were appointed as Co-	COMMENTS:
		Executors on 5/27/14 with Limited IAEA without bond.	Note: Petitioner filed a
		Letters issued 10/3/14.	Petition For Preliminary
Co	nt. from 072115	At the bearing on 5/27/14 the Court set this status	Distribution on 7/8/15
	Aff.Sub.Wit.	At the hearing on 5/27/14, the Court set this status hearing for the filing of the first account or petition for	that is Page B.
	Verified	final distribution.	However, Petitioner
			has not yet filed an
	Inventory	Note re history: The following events have occurred in	I&A or first account.
	PTC	this estate:	
	Not.Cred.	1&A Partial No. 1 filed 9/5/14 includes various real	Minute Order 7/21/15:
	Notice of	property with a total value of \$250,000.00.	Counsel (Alaina
	Hrg	Note: This I&A is defective. #5 (Property Tax	Ibarra) represents that
	Aff.Mail	Certificate) is checked "not applicable," however,	she just received the final Inventory and
	Aff.Pub.	that is not the case, because this I&A consists of real	Appraisal from Mr.
	Sp.Ntc.	property.	Diebert yesterday.
	Pers.Serv.	Final I&A filed 8/11/15 reflects additional real property	,
	Conf.	valued at \$210,000.00.	Note: Final I&A was
	Screen		filed 8/11/15.
	Letters	On 1/28/15, the Court confirmed the sale of one of	
	Duties/Supp	the properties and ordered the proceeds placed into	Need first account
	Objections	a blocked account. Receipt was field 3/3/15.	or petition for final
	Video		distribution. Probate Code
	Receipt	On 6/19/15, the Co-Executors filed an Ex Parte Petition	§12200.
	CI Report	for Withdrawal of Funds from Blocked Account that requested distribution of the funds in the blocked	312200.
	9202	account to the beneficiaries. The petition was denied,	
	Order	as no order for distribution has been entered.	
	Aff. Posting	1	Reviewed by: skc
	Status Rpt	On 7/8/15, the Co-Executors filed a Petition for	•
	•	Preliminary Distribution that is set for hearing on	Reviewed on: 8/7/15
	UCCJEA	= 8/13/15.	Updates: 8/11/15
	Citation FTB Notice	Status Report filed 7/16/15 (with notice of hearing to	Recommendation: File 8A - Garza
	I ID MONCE	all heirs) states the estate is not in a condition to be closed at this time. Responses from the Franchise Tax Board and the Victim's Compensation and Government Claims Board are pending. The Final Inventory and Appraisal should be completed within 30 days. The Co-Executors have filed a Petition for Preliminary Distribution that is set for hearing on 8/13/15. An additional 60-90 days is requested to continue administration and to file a final account and petition for final distribution.	THE DA - GUIZU
	•		8A

Case No. 13CEPR00940

Attorney

Nunez, Henry D. (for Co-Executors)

Petition for Preliminary Distribution (Prob. Code §11620 et seq.)

DO	D: 9/28/11	ESTELLA GARZA RAQUEL NANEZ, and	NEEDS/PROBLEMS/COMMENTS:
		ROJELIA GONZALEZ, Co-Executors, are	
		Petitioners.	1. The Final I&A was recently filed
		Petitioners state the I&A filed 9/5/14	on 8/11/15 reflecting additional real property in Parlier, CA,
		shows the estate's total value to be	valued at \$210,000.00 as of the
	Aff.Sub.Wit.	\$250,000.00. On 2/20/15, Honorable	decedent's date of death,
~	Verified	Judge Kazanjian approved and signed	which was approx. four years
~	Inventory	an Amended Order to Deposit Money	ago.
~	PTC	Into Blocked Account. Thereafter,	_
*		escrow closed for the estate real	Petitioners do not allege that
-	Not.Cred.	property located at 13620 E. Cypress	this distribution does not
~	Notice of	Ave., in Parlier, and a blocked account	exceed 50% of the net value of
~	Hrg	was opened with \$95,029.13.	the estate as required by
Ě	Aff.Mail w	Petitioners now seek to distribute the	Probate Code §11623(a)(2), and do not provide the status of
	Aff.Pub.	total amount of \$95,029.13 equally to	why the estate is not in a
	Sp.Ntc.	each beneficiary of the estate.	position to close pursuant to
	Pers.Serv.		Probate Code §12200.
	Conf.	The distribution of these funds may be	_
	Screen	made without loss to creditors or injury to	The Court may require further
~	Letters	any person interested in the estate	clarification.
	Duties/Supp	because Petitioners are informed and	055 4 D D J T O N 4 1 D 4 0 5 0
	Objections	believe that the decedent did not have	SEE ADDITIONAL PAGES
	Video	any outstanding creditors and the total amount will be equally divided and	
	Receipt	distributed to the 10 beneficiaries listed	
	CI Report	on Exhibit A, \$9,502.91 each.	
>	9202		
~	Order	Petitioners state the remainder of the	
	Aff. Posting	estate consists of additional real	Reviewed by: skc
	Status Rpt	property located at 13535 & 13539 E.	Reviewed on: 8/7/15
	UCCJEA	Bulah and 8597 S. Milton in Parlier, CA.	Updates: 8/11/15
	Citation	Petitioners pray for an order of this court	Recommendation:
~	FTB Notice	for preliminary distribution as follows:	File 8B – Garza
		That Petitioners be permitted to	
		withdraw the total sum of \$95,029.13,	
		which is the total amount of funds in	
		the blocked account, and distribute	
		\$9,502.91 to each beneficiary; and	
		2. Such additional orders as this court	
		deems proper.	
			QR

Case No. 13CEPR00940

Page 2

NEEDS/PROBLEMS/COMMENTS (Cont'd):

2. The petition appears to request to distribute the share of beneficiary Teodoro Garza Garza, who is incarcerated in a state prison, outright to him. However, the Decedent's will states:

"The share and interest to Teodor Garza Garza, shall remain in trust pursuant to the terms described in the N & R Family Trust, for his benefit, until he is released from prison, or upon his death, whichever comes first, and then to his children by right of representation."

If preliminary distribution is to include the share of Teodoro Garza Garza, need clarification and information regarding the N & R Family Trust, including a declaration from the trustee pursuant to Local Rule 7.12.5.

- 3. This petition, filed 7/8/15, states notice was given to the Victim's Compensation and Government Claims Board. A Status Report subsequently filed 7/16/15 states inquiry regarding one of the beneficiaries (Teodoro Garza Garza) is pending. Need update on this inquiry.
- 4. If granted, need revised proposed order in compliance with Local Rule 7.6.1: Order must be complete in itself and shall set forth the names of persons along with amounts of money distributed to each person specifically, drawn so that its general effect may be determined without reference to the petition upon which it is based.

Case No. 14CEPR00198

Attorney Attorney Wanda S. Moore (Estate)

Helon, Marvin T. (for Co-Administrator Lorene E. Moore)

Aldridge, Melanie J. (for Co-Administrator Charlton W. Moore)

Status Hearing Re: Filing of the First Account and Removal of items in the house.

DO	D: 1/12/14	CHARLTON W. MOORE and LORENE E. MOORE, Son and Daughter, were appointed Co-Administrators with Full IAEA without bond and Letters issued on	NEEDS/PROBLEMS/ COMMENTS:
		= 4/10/14.	Minute Order 6/19/15:
		At the hearing on 4/10/14, the Court set this status	The Court authorizes
		hearing for the filing of the first account or petition for	the estate to advance
	Aff.Sub.Wit.	final distribution.	Lorene Moore up to \$1,000.00 for traveling
>	Verified	L&A Partial No. 1 filed 8/5/14: \$401,350.52	to residence for final
>	Inventory	Final I&A filed 10/17/14: \$142,456.47	removal of personal
>	PTC	Total: \$543,806.99	property and cleanup.
>	Not.Cred.	Status Report filed 6/10/15 by Co-Administrator Lorene	The Court reserves the
	Notice of	Moore states the estate is not in a condition to be	right to decide if funds advanced will come
	Hrg	closed as Administrators still need to conclude the final removal of personal property and cleanup of the	out of the estate or
	Aff.Mail	decedent's residence and sell the decedent's	Lorene Moore's shares
	Aff.Pub.	residence. A realtor has been retained to market the	of the estate. Status
	Sp.Ntc.	property. Co-Administrator Lorene Moore does not	hearing is set for
	Pers.Serv.	have the resources to travel to Fresno from her home	8/13/15. If items not removed by then,
	Conf.	in Austin, TX, to remove personal items that she is to receive, and Co-Administrator Charlton Moore has	Lorene Moore is to be
	Screen	not agreed to allow the estate to pay her travel	personally present or
<u> </u>	Letters	expenses. It is believed that it would be in the best	by CourtCall.
	Duties/Supp	interest of the estate to conclude a sale prior to	Note: Undated status
	Objections	making final distribution. An additional 180 days is	Note: Updated status reports have been
	Video	therefore requested. If the Court determines not to allow the Co-Administrators to continue	filed by both attorneys.
	Receipt	administration, then the Public Administrator or some	See Page 2.
\	CI Report	other independent person should be appointed as	l
Ě	9202	neither Co-Administrator is comfortable with and does	Note: Co-Administrator
	Order	not approve of the other handling administrative	Lorene Moore resides
		matters alone.	in Austin, TX.
		Status Report filed 6/15/15 by Co-Administrator	Co-Administrator
		Charlton Moore states a realtor has been retained to	Charlton Moore
		market the property, but cannot move forward until the house is in a condition to show and a listing price	resides in Mill Valley, CA. They are the sole
		established. On Co-Administrator Lorene Moore's last	heirs of the estate.
		visit to Fresno, she failed to remove the last remaining	nens of the estate.
		personal items although she rented a U-Haul and	Need first account
		moved other items out of the house. Through counsel, Co-Administrator Charlton Moore agreed to advance	or petition for final
		her airfare to return again to Fresno so long as the	distribution pursuant to Probate
		advance is charged against her share of the estate.	Code §12200.
	Aff. Posting	He is also willing to hire a third party to remove the	Reviewed by: skc
~	Status Rpt	balance and place it in storage in her name.	Reviewed on: 8/7/15
	UCCJEA	However, Co-Administrator Charlton Moore requests that the status hearing be continued for no more than	Updates:
	Citation	60 days to determine whether the personal property	Recommendation:
~	FTB Notice	ah been removed from the estate. At that point, Mr.	File 4 - Moore
		Moore will evaluate requesting that the Court	
		determine whether it is in the best interest of the	
		estate to appoint the Public Administrator or other independent person.	
		Тиморонион ровон.	
			9

Page 2

Second Status Report filed 8/3/15 by Charlton W. Moore states after receiving the \$1,000.00 advance from the estate, Lorene E. Moore removed her tangible personal property from the decedent's residence. A realtor has been retained to market the property, but an agreement has not yet been signed. The realtor obtained two bids for trash removal, which took place on 7/29/15. The next step is to have it cleaned before it can be shown to prospective buyers. Charlton believes it is in the best interest of the estate to conclude a sale of the real estate prior to making final distribution, and requests the court continue the status hearing for no more than 120 days to determine whether the sale is proceeding smoothly.

Supplemental Status Hearing Report filed 8/4/15 by Lorene E. Moore states she traveled to Fresno from her home in Texas and removed remaining tangible personal property from the residence. The residence has been cleared of debris and prepared for sale. A listing/marketing agreement has been signed with Guarantee Real Estate. The court is requested to allow the co-administrators to continue administration to allow time to sell the real property. An additional 120-180 days is requested.

10 Rinko Yoshioka (Estate)

Case no. 14CEPR00531

Attorney: John W. Phillips (for Petitioner William Yoshioka)

Attorney: Steven L. Shahbazian (for Executor Joyce Yamaguchi)

Attorney: Jeffrey Jaech (for Objector State Center Community College District)

Petition for Surcharge of Trustee; for Order Directing Trustee to Return Trust Property to Trust; and for Order Compelling Trustee to Account and Report.

		NEEDS/PROBLEMS/COMMENTS:
Cont. from 070915 Aff.Sub.Wit. Verified		Continued from 7/9/15. Minute order states Mr. Markeson is specially appearing for John Phillips; requests a continuance to allow time for a response.
Inventory PTC		As of 8/7/15 the following issue remains:
Not.Cred.		
Notice of Hrg		The petition involves the decedent's
Aff.Mail		trust. The decedent's trust is a
Aff.Pub.		separate entity and therefore
Sp.Ntc.		cannot be heard in this estate matter. A new trust action must be
Pers.Serv.		initiated for issues regarding the
Conf.		decedent's trust.
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 8/7/15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 10 - Yoshioka

11 Richard E. Davis (Estate) Case No. 14CEPR00613

Attorney Erlach, Mara M. (for Melynda Bowman – Administrator/Petitioner)

First and Final Report of Administrator and Petition for Its Settlement, for Allowance of

Attorneys' Statutory Fees, and for Final Distribution of Estate on Waiver of Account

DOD: 05/31/14	MELYNDA BOWMAN, Administrator, is	NEEDS/PROBLEMS/COMMENTS:
	Petitioner.	
	Accounting is waived.	
Cont. from Aff.Sub.Wit.	I & A - \$262,134.51 POH - \$71,999.48	
✓ Verified Inventory	Administrator- waived	
PTC Not.Cred.	Attorney - \$8,240.00 (statutory)	
Notice of h/a	Costs - \$1,292.00 (filing fees, certified copies, publication)	
Aff.Mail n/a Aff.Pub. Sp.Ntc.	Distribution, pursuant to intestate succession, is to:	
Pers.Serv.	Melynda Bowman - \$62,467.48 cash	
Conf. Screen		
Letters 08/22/14		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
√ 9202		
✓ Order		
Aff. Posting		Reviewed by: JF
Status Rpt		Reviewed on: 08/07/15
UCCJEA]	Updates:
Citation] -	Recommendation: SUBMITTED
✓ FTB Notice		File 11 – Davis

12 Alejandro Maldonado (GUARD/P) Petitioner: Abel Maldonado (pro per)

Attorney: J. Todd Armas (for mother, Raquel Rodriguez)

Petition to Appoint Guardian of the Person

Case No. 14CEPR00917

			Temporary Expires 8/13/15	NEEDS/PROBLEMS/COMMENTS:
			<u>,,,</u>	
			ABEL MALDONADO, maternal grandfather, is petitioner.	
Со	nt. from		See petition for details.	
	Aff.Sub.Wit.		see pennon for defails.	
✓	Verified			
	Inventory		Objections of Mother, Raquel	
	PTC		Rodriguez filed on 10/16/14	
	Not.Cred.		Court Investigator Charlotte Bien's	
1	Notice of Hrg		Report filed on 11/21/14	
✓	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.	W/		
1	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
1	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt	<u> </u>		Reviewed on: 8/7/15
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 12 – Maldonado

Attorney Attorney Fray, Brian H. (for Applicant Catherine Kelley, Conservator) LeVan, Nancy J. (Court-appointed for Conservatee)

Ex Parte Application for (1) Approval Re Farmer's Insurance to Surrender Life Insurance Policy Re Conservatee Richard Joseph Shannon; and (2) Authority to Execute Exclusive Listing Agreement Re Conservatee Richard Joseph Shannon and Sales of Family Residence

			(
			(
			0 07
			4
Co	nt. from		F
	Aff.Sub.Wit.		
	Verified	Χ	6
	Inventory		
	PTC		4
	Not.Cred.		,
	Notice of	Χ	
	Hrg		
	Aff.Mail	Χ	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf.		
	Screen		
	Letters		
	Duties/Supp		
	Objections		•
	Video Receipt		
	Cl Report		
	9202		
	Order		•
•	3.45.		
	Aff. Posting		•
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

CATHERINE KELLEY, daughter and Conservator of the Person and Estate appointed on 2/2/2015 with bond of \$25,740.00, is Applicant.

Final Inventory and Appraisal filed 6/8/2015 shows an estate value of \$80,375.76.

Applicant states:

- Farmer's Life Insurance Policy of Conservatee: The [conservatorship] estate's personal property includes a Farmer's Life Insurance Policy owned by the Conservatee;
- [Surrender of the policy] is necessary to provide cash to pay debts and expenses, and is advantageous to the estate and in the best interest of the persons in the estate so that Conservatee may receive Medi-Cal and be placed in a memory care center;
 - The estate cannot afford assisted living care for the Conservatee and the estate requires cash to pay debts, including this Court's investigation costs;
- Conservatee's consent is not attached hereto, but Conservator's consent is filed herein;
- The surrender is not for less than the actual value of the property and the surrender is in the best interests of the estate;
 - ~Please see additional page~

NEEDS/PROBLEMS/COMMENTS:

- 1. Ex Parte Application is not verified by Petitioner; only the Declarations filed 7/27/2015 are verified by Petitioner.
- 2. Pursuant to Order on the Ex Parte Application signed 7/29/2015, need Notice of Hearing and proof of at least 10 days' service of notice prior to the hearing for the 16 persons named in Item 11 of the initial Petition for Appointment of Probate Conservator filed 12/19/2014.
- 3. Prayer of the Ex Parte Application filed 7/27/2015 states Conservator prays that this Petition [sic] be set for a hearing, that the Court grant an order confirming the surrender of the life insurance policy, and an order confirming the exclusive listing and sale of real property. It appears based solely upon the Petitioner's request that this matter be set for hearing that a filing fee of \$435.00 is due for the instant Application, which requests a hearing and requests Court orders on two matters that would have been more appropriately filed in two separate petitions so as not to circumvent two ex parte filing fees and one filing fee for a petition regularly set for hearing.

~Please see additional page~

ricase see dadiional page
Reviewed by: LEG
Reviewed on: 8/11/15
Updates:
Recommendation:
File 13 – Shannon

Applicant states, continued:

- <u>Sale of Conservatee's Real Property and Execution of Exclusive Listing Agreement</u>: As reflected in the
 Declaration of Conservator filed with this application, CENTURY 21, C WATSON REALTY, Agent Miguel
 C. Maldonado, is ready to list the real property and an appraisal has already been performed;
- The proposed agreement provides for the payment of a commission to the agency from the proceeds from the sale of the property in an amount to be approved by the Court;
- The estate's real property described at 22248 and 22264 Tollhouse Road, Clovis, is necessary for cash to pay debts and expenses and is advantageous to the estate and in the best interest of persons in the estate so that Conservatee may receive Medi-Cal and be placed in a memory care center;
- The estate will have incurred loss or expense by [the real property] being kept as the estate cannot
 afford assisted living care for Conservatee and to provide the estate cash to pay estate debts
 including this Court's investigation costs;
- Conservatee's consent is not attached hereto, but Conservator's consent is filed herein.

Conservator prays that this *Petition [sic]* be set for a hearing, that the Court grant an order confirming the surrender of the life insurance policy, and an order confirming the exclusive listing and sale of real property.

NEEDS/PROBLEMS/COMMENTS, continued:

- 4. Waiver of Notice of Proposed Action filed 7/27/2015 appears to intend a waiver of notice of the two actions for which Petitioner seeks approval; the Judicial Council form DE-166 utilized and signed by the persons is for use in estates rather than conservatorships, and not all persons entitled to notice have signed the waiver of notice of proposed action. Further, Item 4(b) of the form lists two parcels of real property to be sold that do not appear to be assets of the conservatorship estate (please see issue below).
- 5. Final Inventory and Appraisal filed 6/8/2015 shows the real property asset belonging to the conservatorship as 25% joint tenant interest in 22254 Tollhouse Road, Clovis. The instant Application is requesting to sell real property at 22264 Tollhouse Road, Clovis, and at 22248 Tollhouse Road, Clovis, neither of which are listed on the Final Inventory and Appraisal filed 6/8/2015 as assets of this Conservatorship owned by the Conservatee. Further, Application does not indicate that the interest of the Conservatee sought to be sold is anything other than a 100% interest in real property. Need clarification as to the subject real property, and/or amended Final Inventory and Appraisal if the conservatorship estate includes the real property parcels described in the Application.
- 6. Bond of **\$25,740.00** was filed on 2/5/2015. *Petition* does not address sufficiency of bond and whether bond should be increased pursuant to Probate Code § 2320.1 (following surrender of life insurance policy), and §§ 2330 and 2540 (following sale of the real property).

~Please see additional page~

13 Second Additional Page, Richard Joseph Shannon (CONS/PE) Case No. 14CEPR01149

NEEDS/PROBLEMS/COMMENTS, continued:

- 7. Application states the surrender is not for less than the "actual value of the property" and the surrender is in the best interests of the estate. However, the Application is silent on the value associated with the life insurance policy (Declaration of Conservator filed 7/27/2015 attaches a copy of Policy Specifications stating a \$50,000.00 policy exists, but no value is confirmed), and Application provides no information or documentation as to the "actual value of the property" nor as to the "surrender value" of the policy. Need additional information regarding the character and value of the life insurance policy proposed to be surrendered by Petitioner.
- 8. Application requests authority to sell the Conservatee's personal residence, but does not include information pursuant to Probate Code § 2540 which states the Conservator shall inform the court as to whether the Conservatee supports or is opposed to the proposed sale. Need declaration as required by Probate Code § 2540(b) regarding Conservatee's opinion regarding proposed sale. (Note: Petitoner does not have § 2590 powers. If Court authorizes Petitioner to sell the real property (once its actual identity is clarified), Petitioner will need to file a Report of Sale and Petition for Order Confirming Sale of Real Property (mandatory-use Judicial Council form DE-260) pursuant to Probate Code § 10308(a), which requires proof of 15 days' posting by the Court of the notice of time and place of hearing pursuant to Probate Code §§ 10308(c) and 1230(a).)

9. Need revised proposed order based upon the following:

- Proposed order includes statements "in the best interest of the persons in the estate" which are inappropriate statements and should be stricken from the proposed order;
- Proposed order appears to find by referencing in various places that the Conservatee may "be placed in a memory care center" which violates the Order Appointing Probate Conservator filed 2/2/2015, as the Conservator was not granted authority to place the Conservatee in a care or nursing facility. Proposed order should contain no references to placing the Conservatee in a memory care center, which requires Petitioner to seek such authority in a petition with a supporting physician's Medical Capacity Declaration. (Note: Capacity Declaration filed 12/19/2014 does not support placement powers.)
- Proposed order should include the exact dollar sum of the life insurance policy value that Court is authorizing the Petitioner to receive from the surrendered life insurance policy, and should specify the Farmer's Life Insurance Policy Number as indicated in the Application.
- Proposed order does not include in the prayer (following all enumerated paragraphs) any finding to grant Petitioner authority to sell Conservatee's real property. Language should be added to the proposed order regarding authority to sell and should state that the sale shall be conducted pursuant to Probate Code § 2543, shall be court-confirmed, and shall require bond increase if so ordered by Court pursuant to Probate Code § 2330. It should be noted that the sale of real property must be conducted under the Probate Code provisions for Report of Sale.

<u>Note Re Future Date</u>: Status Hearing is currently set for the filing of the first account of the Conservatorship Estate on **Wednesday**, **April 6**, **2016 at 9:00 a.m. in Department 303**.

<u>Note</u>: If *Application* is granted, Court will set status hearing for receipt of liquidated life insurance policy funds and for posting of increased bond by Conservator of the Estate, as follows:

• Wednesday, September 30, 2015 at 9:00 a.m. in Dept. 303 for filing proof of receipt of insurance policy funds and proof of increased bond.

Petitioner

Ferguson, Anita Marie (Pro Per – Fiancee – Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 7/25/14			ANITA MARIE FERGUSON, Named	NE	EDS/PROBLEMS/COMMENTS:
			executor without bond, is Petitioner.	C	ONTINUED TO 9/24/15
			Full IAEA – need publication		r Petitioner request
	Cont from 050715, 061815		Will dated 3/14/04	1.	Need clarification re Decedent's name: Petitioner spells the decedent's last name "FLEMMING" on the petition, but
	Aff.Sub.Wit.		Residence: Fresno		elsewhere spells it "FLEMING." Note: The
~	Verified		Publication: Need publication		will appears to reflect "FLEMING" in the
	Inventory		Estima ada al contro a fantada e		decedent's handwriting on Page 1.
	PTC		Estimated value of estate: Personal property: \$8,000.00	2.	Need Proof of Subscribing Witness signed by at least one witness. (Note: Petitioner
	Not.Cred.		Real property: \$31,000.00		filed a Proof of Subscribing Witness and a
	Notice of	Х	(\$55,000.00 encumbered for		Proof of Holographic Instrument signed
	Hrg		\$24,000.00)		by herself; however, this is insufficient, as it does not appear that she is one of the
	Aff.Mail	Χ	Drob site Defere as Charles Diale and		subscribing witnesses, and further she is
	Aff.Pub.	Χ	Probate Referee: Steven Diebert		an interested party as sole heir.)
	Sp.Ntc.			3.	Need Notice of Petition to Administer
	Pers.Serv.				Estate and proof of service on Anne Todd
	Conf.				Cortez (sister) pursuant to Probate Code §8110.
>	Screen			۱,	Need proof of publication pursuant to
*	Letters			4.	Probate Code §8120.
	Duties/Supp			5	This case was opened with a fee waiver.
	Objections Video			•	Please note that upon distribution, all
	Receipt				Court filing fees will be due.
	CI Report				
	9202				
~	Order				
	Aff. Posting			Re	viewed by: skc
Status Rpt				Re	viewed on: 8/6/15
UCCJEA					dates: 8/11/15
	Citation				commendation:
	FTB Notice			File	e 14 - Flemming

14

15

Case No. 15CEPR00444

Attorney

Charlotte Nix (GUARD/P)

Lopez, Amy L. (for Cheryl A. Bricker – Paternal Grandmother – Petitioner)

Petition for Appointment of Guardian of the Person (Prob. Code §1510)

reliiion for Appoiniment of Guardian of the Ferson (Frob. Code §1510)				
	See petition for details.	NEEDS/PROBLEMS/COMMENTS:		
Cont. from 070915 Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg	See petition for details.	1. The attorney's declaration filed 7/22/15 states Notice of Child Custody Proceeding for Indian Child (ICWA-030) has been served as required on all appropriate tribes/agencies and responses received; however, California Rule of Court 7.1015(c)(3) states the originals of all notices served, return receipts, and responses received must be filed with the		
✓ Aff.Mail W		court before the hearing.		
Aff.Pub.		No original or copy of the		
Sp.Ntc.		Notice of Child Custody		
Y Pers.Serv. W		Proceeding for Indian Child		
Conf.		(Form ICWA-030) has been		
Screen V Letters		filed, and the declaration contains only copies (not		
Leneis		originals) of the return receipts		
Dolles/30pp		and responses.		
Objections				
Video Receipt				
✓ CI Report	=			
✓ Clearances				
✓ Order				
Aff. Posting		Reviewed by: skc		
Status Rpt	•	Reviewed by: 3RC		
✓ UCCJEA	4	Updates:		
Citation	4	Recommendation:		
FTB Notice		File 15 - Nix		
	Ш	<u> </u>		

16 Alvin Harper (GUARD/P)
Petitioner Olivero, Natywa (Pro Per – Paternal Cousin)

Petition for Appointment of Guardianship of the Person

Age: 6		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
Со	nt. from 071615	NATYWA OLIVERO, paternal cousin, is petitioner. Please see petition for details	Minute Order of 07/16/2015: Examiner notes provided in open court; Ms. Olivero is directed to file a Declaration of Due Diligence as to the efforts made
	Aff.Sub.Wit.	· · · · · · · · · · · · · · · · · · ·	to notice Douglas Harper, Father, then
1	Verified		the Court will consider whether or not to grant temporary guardianship. The
	Inventory		Court orders CPS to do a welfare
	PTC		check on the minor and to seek any
	Not.Cred.		and all lawful assistance necessary
	Notice of Hrg X		from law enforcement to assess the
	Aff.Mail X		safety and welfare of the minor.
	Aff.Pub.		1. Notice of Hearing.
	Sp.Ntc.		j j
	Pers.Serv. X		2. Need proof of personal service
1	Conf. Screen		fifteen (15) days prior to the hearing of the Notice of Hearing along with
	Letters		a copy of the Petition for
Ě			Appointment of Guardian or
✓	Duties/Supp		consent and waiver of notice or
	Objections		declaration of due diligence for:
	Video		Douglas Harper (Father)Jessica Troup (Mother)
-	Receipt		
✓	CI Report		3. Need proof of service fifteen (15)
	9202		days prior to the hearing of the
√	Order		Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due diligence for: • Maurice Harper (Paternal Grandfather) • Joyce (Paternal Grandmother – Last name not listed)
	Aff. Posting		Reviewed by: LV
H	Status Rpt UCCJEA		Reviewed on: 08/10/2015
✓			Updates:
	Citation		Recommendation:
	FTB Notice		File 16 - Harper

Petition for Letters of Special Administration

Age:	NEEDS/PROBLEMS/COMMENTS:
DOD:	
	OFF CALENDAR. Order
	appointing Special Administrator was
Cont. from	signed ex parte on 8/7/15.
Aff.Sub.Wit.	
Verified	
Inventory	
PTC	
Not.Cred.	
Notice of	
Hrg	
Aff.Mail	
Aff.Pub.	
Sp.Ntc.	
Pers.Serv.	
Conf.	
Screen	
Letters	
Duties/Supp	
Objections	
Video	
Receipt	
CI Report	
9202	
Order	
Aff. Posting	Reviewed by: KT
Status Rpt	Reviewed on: 8/7/15
UCCJEA	Updates:
Citation	Recommendation:
FTB Notice	File 17 – White

Olive Naomi Pierce aka Olive N. Pierce aka Olive Pierce (Estate) Case No. 15CEPR00660

Attorney Markeson, Thomas A. (for Georgia Christine Salvo – daughter/Petitioner)

Petition for Probate of Will and for Letters Testamentary: Authorization to Administer

Under the Independent Administration of Estates Act

DC	D: 06/06/15		GEORGIA CHRISTINE SALVO,	NEEDS/PROBLEMS/COMMENTS:
			daughter/named Executor, is	
			Petitioner. Full IAEA – OK	The petition states that the decedent had a deceased Should have and
Со	nt. from		FUILIAEA – OK	spouse. Need name and date of death of deceased
√	Aff.Sub.Wit.		All heirs waive bond	spouse pursuant to Local Rule
✓	Verified		Halagraphia Will data d 0//0//14	7.1.1D.
	Inventory		Holographic Will dated 06/06/14 Will dated 06/07/14 but executed on	Note: If granted, the Court will set status
	PTC		03/16/15	hearings as follows:
	Not.Cred.		(Petitioner requests to admit both wills,	Thurs Jan. 7, 2016 for filing the
✓	Notice of		the will executed on 03/16/15 does not	Inventory and Appraisal
	Hrg		revoke the 06/06/14 holographic will)	Thurs Oct. 6, 2016 for filing the first
✓	Aff.Mail	w/		account or petition for final
✓	Aff.Pub.		Residence: Fresno Publication: The Business Journal	distribution.
	Sp.Ntc.		Fublication. The business Journal	If the proper items are on file prior to the
	Pers.Serv.		Estimated Value of the Estate:	status hearing dates, the status hearings
	Conf.		Personal property - \$ 1,500.00	may be taken off calendar.
	Screen		Real property - 240,000.00	
✓	Letters		Total - \$241,500.00	
✓	Duties/Supp		Drob ata Dafaraa, CTEVEN DIEDERT	
	Objections		Probate Referee: STEVEN DIEBERT	
	Video			
	Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 08/07/15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 18 – Pierce
				1Ω

18

19 Michael Daniel Lutz (Estate) Case No. 15CEPR00667

Attorney

Rindlisbacher, Curtis D. (for John F. Lutz – brother/Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer

Under the Independent Administration of Estates Act

	DOD: 04/10/15		IOUN E LUTT brother/nemed Trescriter	NEEDS /DRODI EARS /COAAAENTS:
	DOD: 04/18/15		JOHN F. LUTZ, brother/named Executor	NEEDS/PROBLEMS/COMMENTS:
			without bond, is Petitioner.	Note: The Court will set status hearings as
			Full IAEA – OK	follows:
Со	nt. from		Will dated 12/18/89	Thurs Jan. 7, 2016 for filing the Inventory and Appraisal
✓	Aff.Sub.Wit.			Thurs Oct. 6, 2016 for filing the first
	Verified		Residence: Kerman Publication: The Business Journal	account or petition for final
	Inventory		T Oblication, the bosiness souther	distribution.
	PTC		Estimated Value of the Estate:	If the proper items are on file prior to the
	Not.Cred.		Personal property - \$300,000.00	status hearing dates, the status hearings
✓	Notice of		Real property - 708,000.00	may be taken off calendar.
	Hrg		Total - \$1,008,000.00	
✓	Aff.Mail	w/		
✓	Aff.Pub.		Probate Referee: RICK SMITH	
	Sp.Ntc.			
	Pers.Serv.			
	Conf.			
	Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed on: 08/10/15
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 19 – Lutz

Attorney: Richard A. Ruiz (for Petitioner Deby Constrestano)

Petition for Appointment of Temporary Conservator of the Person

			TEMPORARY EXPIRES 8/13/15	NEEDS/PROBLEMS/ COMMENTS:
			GENERAL HEARING 9/10/15	
Со	nt. from		DEBY CONTRESTANO , niece, is petitioner and requests appointment as temporary conservator of	Court Investigator advised rights on
	Aff.Sub.Wit.		the person.	7/31/15.
1	Verified			
	Inventory		Petitioner states (please see item #1 of the needs/problems/comments)	Temporary petition does not include
	PTC			attachment 3 stating
	Not.Cred.		Court Investigator Report filed on 8/5/15.	facts necessitating a temporary
✓	Notice of Hrg			conservatorship.
1	Aff.Mail	W/		
	Aff.Pub.			
	Sp.Ntc.			
1	Pers.Serv.	W/		
1	Conf. Screen			
1	Letters			
√	Duties/Supp			
	Objections			
✓	Video Receipt			
✓	CI Report			
	9202			
√	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 8/10/15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 20 – Main

21 Alize Reyes (GUARD/P)

Petitioner: Maria Garcia (pro per)
Petitioner: Nicholas Valencia (pro per)

Case No. 15CEPR00745

Petition for Appointment of Temporary Guardian of the Person

	GENERAL HEARING 9/30/15	NEEDS/PROBLEMS/COMMENTS:
	NICHOLAS VALENCIA, uncle, and MARIA GARCIA, aunt, are petitioners.	 Need Notice of Hearing. Need proof of personal service of
Cont. from Aff.Sub.Wit. ✓ Verified Inventory PTC Not.Cred. Notice of X Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. X ✓ Conf. Screen ✓ Letters ✓ Duties/Supp Objections Video Receipt CI Report 9202	Please see petition for details.	the Notice of Hearing along with a copy of the temporary petition or consent and waiver of notice or declaration of due diligence on: a. Pedro Reyes (father) b. Sophia Granillo (mother)
✓ Order Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 8/10/15
✓ UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 21 – Reyes

22A Serenity Portillo, Desire Bryant (GUARD/P) Case No. 15CEPR00750

Petitioner

Bryant, Danielle Desiree (pro per – maternal aunt/Petitioner)

Petition for Appointment of Temporary Guardian of the Person

F			GENERAL HEARING: 10/05/15	NEEDS/PROBLEMS/COMMENTS:
De	Desire, 13		GENERAL HEARING: 10/05/15	NEEDS/FROBLEMS/COMMENTS:
			DANIELLE BRYANT, maternal aunt, is Petitioner.	This Petition is regarding Desire only. See Page 22B for Petition regarding Serenity.
Со	nt. from Aff.Sub.Wit.		Father: NOT LISTED Mother: SABRINA PORTILLO – Consent &	Need Notice of Hearing.
√	Verified		Waiver of Notice filed 08/03/15	2. Need proof of personal
	Inventory PTC		Paternal grandparents: NOT LISTED	service at least 5 court days before the hearing of Notice of Hearing with a copy of the
	Not.Cred.		Maternal grandfather: NOT LISTED	Petition for Appointment of
	Notice of Hrg	Х	Maternal grandmother: CANDICE BRYANT	Temporary Guardian of the Person <u>or</u> Consent & Waiver of
	Aff.Mail			Notice <u>or</u> Declaration of Due
	Aff.Pub.		Siblings: MARK PORTILLO, ANGELINA	Diligence for:
	Sp.Ntc.		PORTILLA, ALFONSO PORTILLO	a. Father (not listed)
	Pers.Serv.	Х	Petitioner states [see Petition].	
✓	Conf.		,	
	Screen			
√	Letters			
✓	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
<u></u>	9202 Order			
Ë	Aff. Posting			Reviewed by: JF
	Status Rpt			Reviewed by: 31 Reviewed on: 08/10/15
√	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 22A – Portillo/Bryant

22A

22B Serenity Portillo, Desire Bryant (GUARD/P) Case No. 15CEPR00750

Petitioner

Bryant, Danielle Desiree (pro per – maternal grandmother)

Petition for Appointment of Temporary Guardian of the Person

Age: 10		GENERAL HEARING: 10/05/15	NEEDS/PROBLEMS/COMMENTS:
Co	ont. from	CANDICE BRYANT, maternal grandmother, is Petitioner. Father: VICTOR PORTILLO – served by mail on 08/05/15	 This Petition is for Sabrina only. Notice of Hearing filed 08/07/15 states that the parents were served by mail on 08/05/15;
✓ ✓	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv.	Mother: SABRINA PORTILLO – served by mail on 08/05/15 Paternal grandparents: NOT LISTED Maternal grandfather: NOT LISTED Maternal grandmother: CANDICE BRYANT Siblings: MARK PORTILLO, ANGELINA PORTILLA, ALFONSO PORTILLO	however, parents are required to be served personally with Notice. Therefore, need proof of personal service at least 5 court days before the hearing of Notice of Hearing with a copy of the Petition for Appointment of Temporary Guardian of the Person or Consent & Waiver of Notice or Declaration of Due Diligence for: a. Victor Portillo (father)
✓ ✓ ✓	Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202 Order Aff. Posting Status Rpt	Petitioner states [see Petition].	Reviewed by: JF Reviewed on: 08/10/15
√	UCCJEA Citation FTB Notice		Updates: Recommendation: File 22B- Portillo/Bryant

22B

Attorney Hopper, Cindy J. (for Petitioners Heather Rule and Kevin Rule)

Petition for Appointment of Temporary Guardian

<u> </u>	rementer Appenmenter et temperary	
		NEEDS/PROBLEMS/COMMENTS:
		OFF CALENDAR
		Per Ex Parte Finding filed 8/5/2015.
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: LEG
Status Rpt		Reviewed on: 8/5/15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 23 – Francois

Ryan Kincade and Serenity Olsen (GUARD/P) Case No. 15CEPR00756

Petitioner Garza, Christina (Pro Per – Maternal Aunt – Petitioner)

Petitioner Sandoval, Robert R., Jr. (Pro Per – Maternal Uncle – Petitioner)

Petition for Appointment of Temporary Guardian of the Person (Prob. Code §2250)

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:
			Need Notice of Hearing (GC-020).
	Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202		 Need proof of personal service of Notice of Hearing with a copy of the temp petition at least five court days prior to the hearing per Probate Code §2250(e) or consent and waiver of notice or declaration of due diligence on: Ryan Kincade (Minor) Serenity Olsen (Minor) Jeremy Mark Olsen (Serenity's Father) Jessica Bohannon (Mother) UCCJEA (GC-120) is incomplete and does not state who the children live/lived with at the various addresses.
_	Order Aff. Posting	-	Reviewed by: skc
	Status Rpt	1	Reviewed on: 8/10/15
~	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 24 – Kincade/Olson

25 Anaveah Ott (GUARD/P)

Attorney Attorney

Case No. 15CEPR00458 Aguirre, L. Kim (for Sabrina Christina Gray – Maternal Grandmother – Petitioner) Hopper, Cindy J. (for Savannah R. Ott – Mother – Objector)

Petition for Appointment of Guardian of the Person (Prob. Code §1511)

	Telinori for Appointment of Oddiction the Ferson (From: Code §1511)		
	See petition for details.	NEEDS/PROBLEMS/	
		COMMENTS:	
		<u>Per Minute Order</u>	
0 1 (070115		<u>8/5/15</u> , this matter is	
Cont. from 070115,		continued only for	
080515		mental health	
Aff.Sub.Wit.		assessment re the	
✓ Verified		mother. Trial is set for	
Inventory		10/6/15.	
PTC			
Not.Cred.		The following issue	
✓ Notice of		remains noted:	
Hrg			
✓ Aff.Mail w		1. If diligence is not	
Aff.Pub.		found, need	
Sp.Ntc.		personal service of Notice of Hearing	
Y Pers.Serv. W		with a copy of the	
✓ Conf.		petition on the	
Screen		father, Vincent	
✓ Letters		Garza, and service	
✓ Duties/Supp		on the paternal	
✓ Objections		grandparents at least 15 days prior	
Video]	to the hearing	
Receipt		pursuant to Probate	
✓ CI Report		Code §1511.	
✓ Clearances			
✓ Order			
Aff. Posting		Reviewed by: skc	
Status Rpt		Reviewed on: 8/7/15	
✓ UCCJEA		Updates:	
Citation		Recommendation:	
FTB Notice		File 25 - Off	

Cailyn Sky Mendoza (GUARD)

Case No. 08CEPR00223

Attorney Attorney Margozian, Michael J. (for Petitioners James Willhoit and Georgette Willhoit)

Hopper, Cindy J. (for Samantha Willhoit, mother)

Petition to Modify Existing Visitation Order

Cont. from				JAMES WILLHOIT and GEORGETTE WILLHOIT, maternal grandparents and Co-Guardians, are Petitioners.	NEEDS/PROBLEMS/COMMENTS: This matter will be heard in Department 72 at 8:30 a.m.
Aff. Posting Status Rpt UCCJEA Citation Reviewed by: LEG Reviewed on: 8/11/15 Updates: Recommendation:	✓ ✓	Aff.Sub.Wit. Verified Inventory PTC Not.Cred. Notice of Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp Objections Video Receipt CI Report 9202		Guardians request the Court either suspend visits between parents and paternal grandparent with Cailyn, or in the alternative, that the visits between these 3 individuals occur at a supervising agency	 Minute Order dated 9/4/2008 states, in pertinent part, that the Court orders visitation with the paternal grandparents and the minor's father, James Mendoza, to be the 1st and 3rd Saturday from 9:00 a.m. to 12:00 p.m. at the Willhoits' home. Minute Order dated 10/23/2008 states the Court orders visitation to remain the same. The Court orders the visits with the father, James Mendoza, be supervised by the guardians or his parents. Currently, there exists no Court order for visits with the mother,
Status Rpt UCCJEA Updates: Citation Recommendation:			^		Reviewed by: LEG
UCCJEA Updates: Citation Recommendation:					
Citation Recommendation:					Updates:
FTB Notice File		Citation			
		FTB Notice			File